ENGLISH UK

Snapshot report

Q3 2026

quarterly student statistics report

English language students studying in the UK

Prepared by:

BONARD

#UKELT

englishuk.com

QUIC QUARTERLY INTELLIGENCE COHORT

Snapshot report Q3 2026

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The quarterly intelligence cohort

Introduction

The UK English language teaching (ELT) sector is facing significant challenges: demand is evolving, markets are maturing and uncertainty has become a constant.

Timely intelligence is essential to identify emerging patterns, track short-term change and benchmark performance against peers throughout the year.

QUIC (the Quarterly Intelligence Cohort) provides quarterly insight based on student week data. Drawing on consistent, pooled data, the analysis enables contributors to monitor trends, compare performance across key source markets, student segments and UK regions and support evidence-informed decision-making within their centres.

A high-level national snapshot is shared publicly; however, the full value of QUIC, including complete reports, interactive datasets and webinars, is available exclusively to contributing centres.

The 2026 contributor reports place greater emphasis on usability and accessibility, while maintaining robust data foundations. Compared with previous years, these reports have a clearer structure and signposting of key findings, improved separation of adult and junior data, fuller integration of market sentiment snapshot results, and historical comparisons focused on prior year performance.

About the data and methodology

Data is collected from year-round and seasonal ELT member centres across the private and state sectors and analysed by English UK's insight partner, BONARD, in line with international research standards.

Data is reported in student weeks, defined as one student studying ten or more teacher-taught hours per week. Those studying fewer hours are excluded.

To show the true geographical distribution of student weeks across the UK, data is reported at the level of individual teaching premises (n=190), rather than aggregated at member centre level (n=103).

UK ELT student data insights from English UK

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General overview

Q3 2026 summary

103
participating members

211,713
overall student weeks

Year-on-year change

Q3 2025 vs Q3 2026

-5%
total weeks

-12%
junior weeks

1%
adult weeks

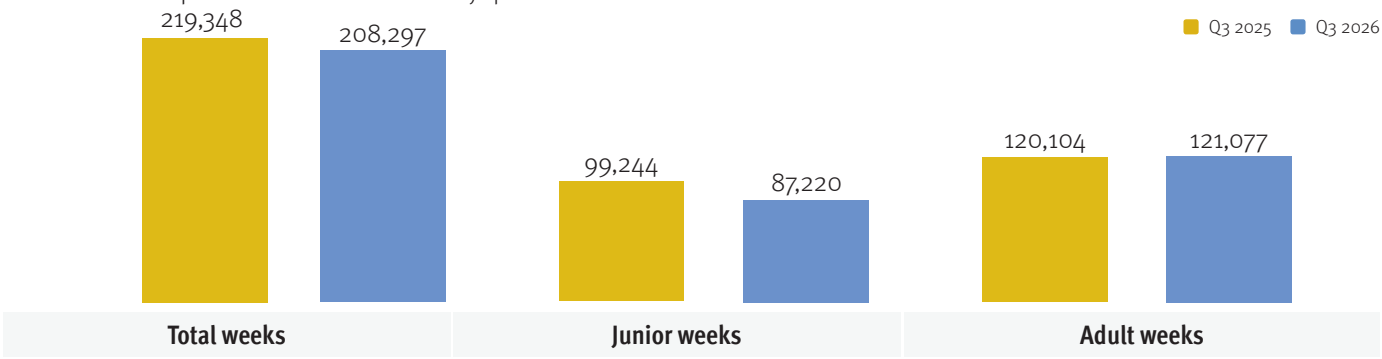
Adult to junior ratio

43%
junior

57%
adult

Note: The figures for year-on-year comparison are based on data from member centres reporting in both respective quarters (n=101).
Note: Any students under the age of 18 who are studying on courses for adults are recorded as 'adult' (the course type overrides the date of birth of the student).

Chart 1
Like-for-like comparison of student weeks by quarter



Note: n=101 member centres participating in both Q3 2026 and in Q3 2025

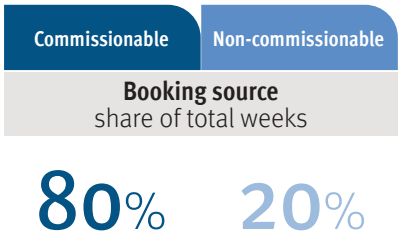
Table 1
QUIC region summary

Region	No. of participants	No. of returns	Proportion of returns	Total weeks	Market share
London	28	53	28.6	65,240	30.8
South and South Eastern England	26	54	29.2	56,121	26.5
Northern England	16	23	12.4	36,291	17.1
South West England and the Channel Islands	15	21	11.4	23,226	11.0
Eastern England	11	16	8.6	19,435	9.2
Scotland and Northern Ireland	3	6	3.2	5,793	2.7
Central England and Wales	4	12	6.5	5,607	2.6
Total	**103**	**185**	**100.0**	**211,713**	**100.0**

Note: The full 2026 dataset includes 103 participating member centres across 190 teaching premises. The number of returns varies by quarter, as some seasonal premises operate only during certain periods of the year. In Q3 2026, 185 teaching premises were open and reporting data. For multi-centre accredited members, the location shown in the "Participant" column refers to the organisation's head office location. However, the "No. of returns" column reflects the actual geographical locations of the individual teaching premises that were operational and reporting in Q3 2026.

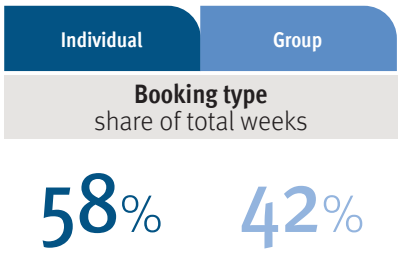
Note: Figures of student weeks per region were rounded and may not add up to the total sum of student weeks.
Note: In order to maintain the confidentiality of individual centre data, some of the regions were merged.

Chart 2
Student weeks by booking source



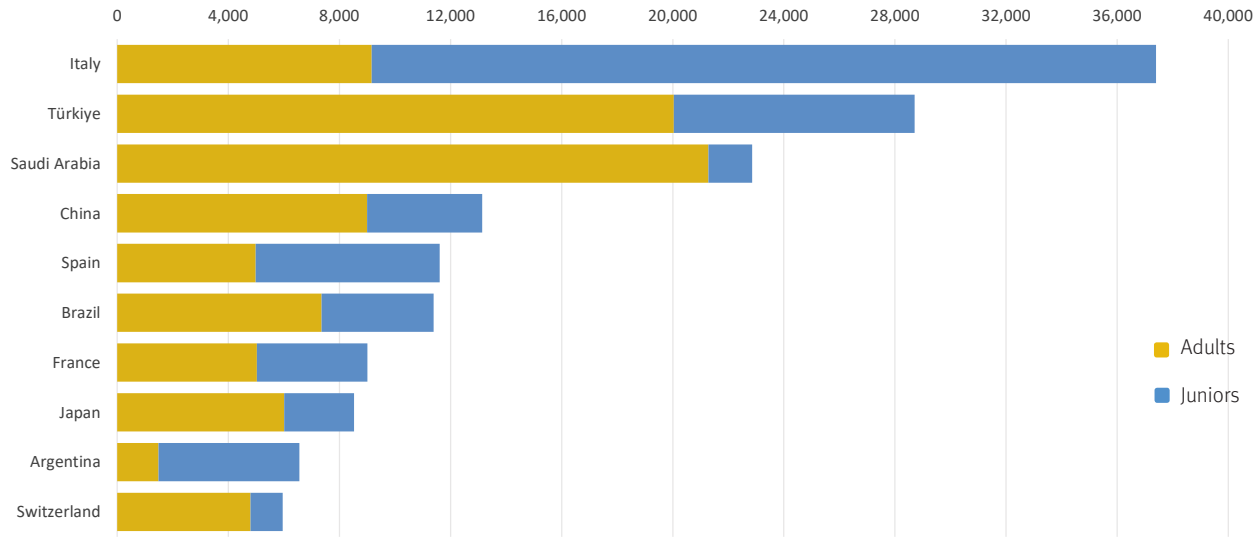
n=103 member centres participating in Q3 2026

Chart 3
Student weeks by booking type



n=103 member centres participating in Q3 2026
Note: 'Group' is defined as at least two students travelling and studying on the same itinerary.

Chart 4
Student weeks by age group and source country (top 10 markets)



Note: n=103 member centres participating in Q3 2026

The participant-only QUIC report provides a full breakdown of all student weeks across 114 source markets, including year-on-year comparisons and further segmentation by age group, course type, booking type and booking source.



The national association for accredited
English language teaching centres.

englishuk.com